

# The introduction of Japanese MVNOs



Futoshi Sasaki

The Deputy General Manager, Strategy and Business Development, MVNO  
Internet Initiative Japan Inc.



# About us

“

In Japan, we are...

The 1st enterprise ISP, launched in 1993

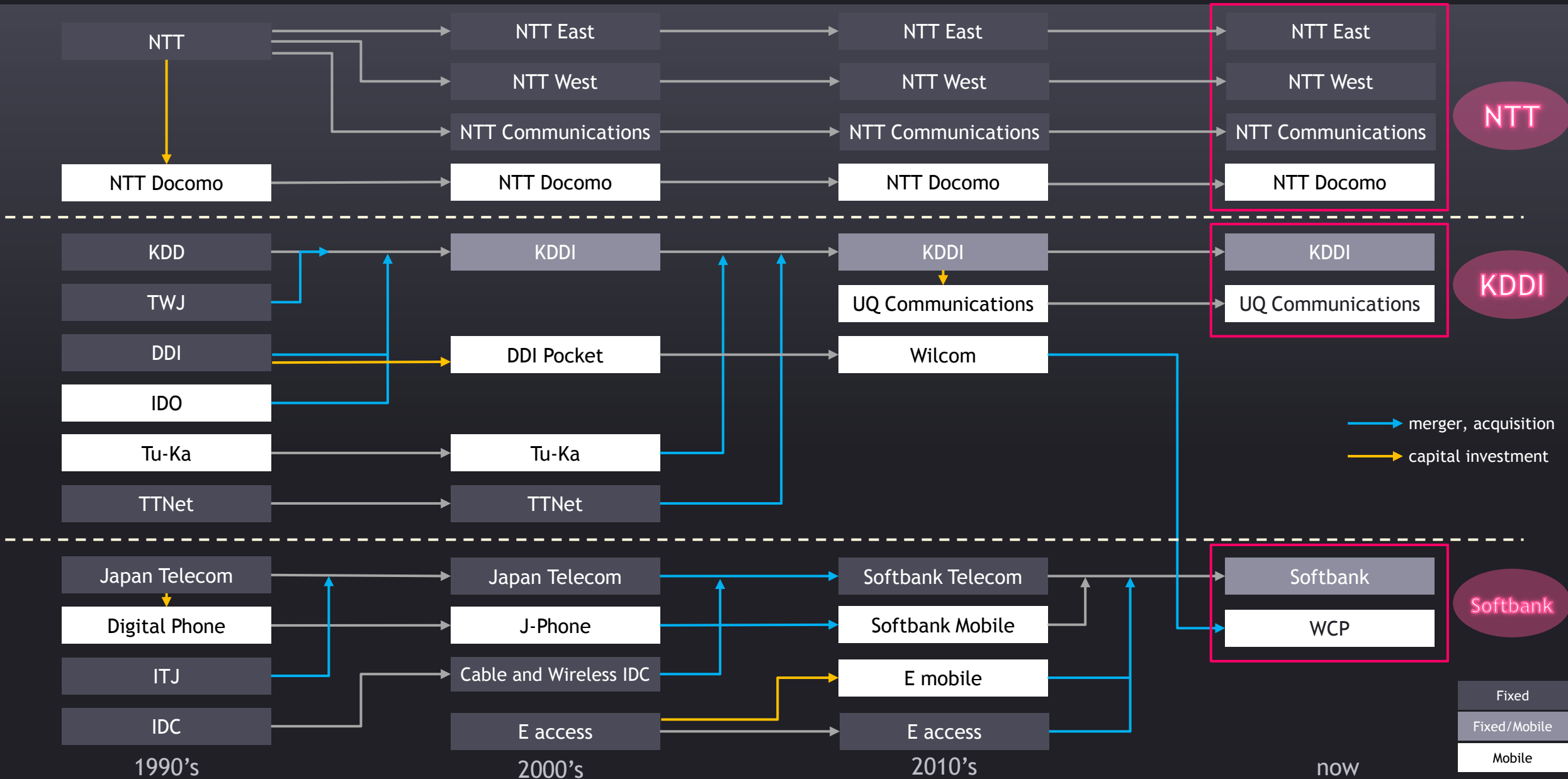
The 1st 3G-supporting MVNO, launched in 2008

The 1st LTE-supporting MVNO, launched in 2012

The 1st **Full MVNO**, launched in March, 2018

Total mobile subscribers: 1 million in 2015, 2 million in 2017

# The transition of the Japanese major telecom operators from 1990's



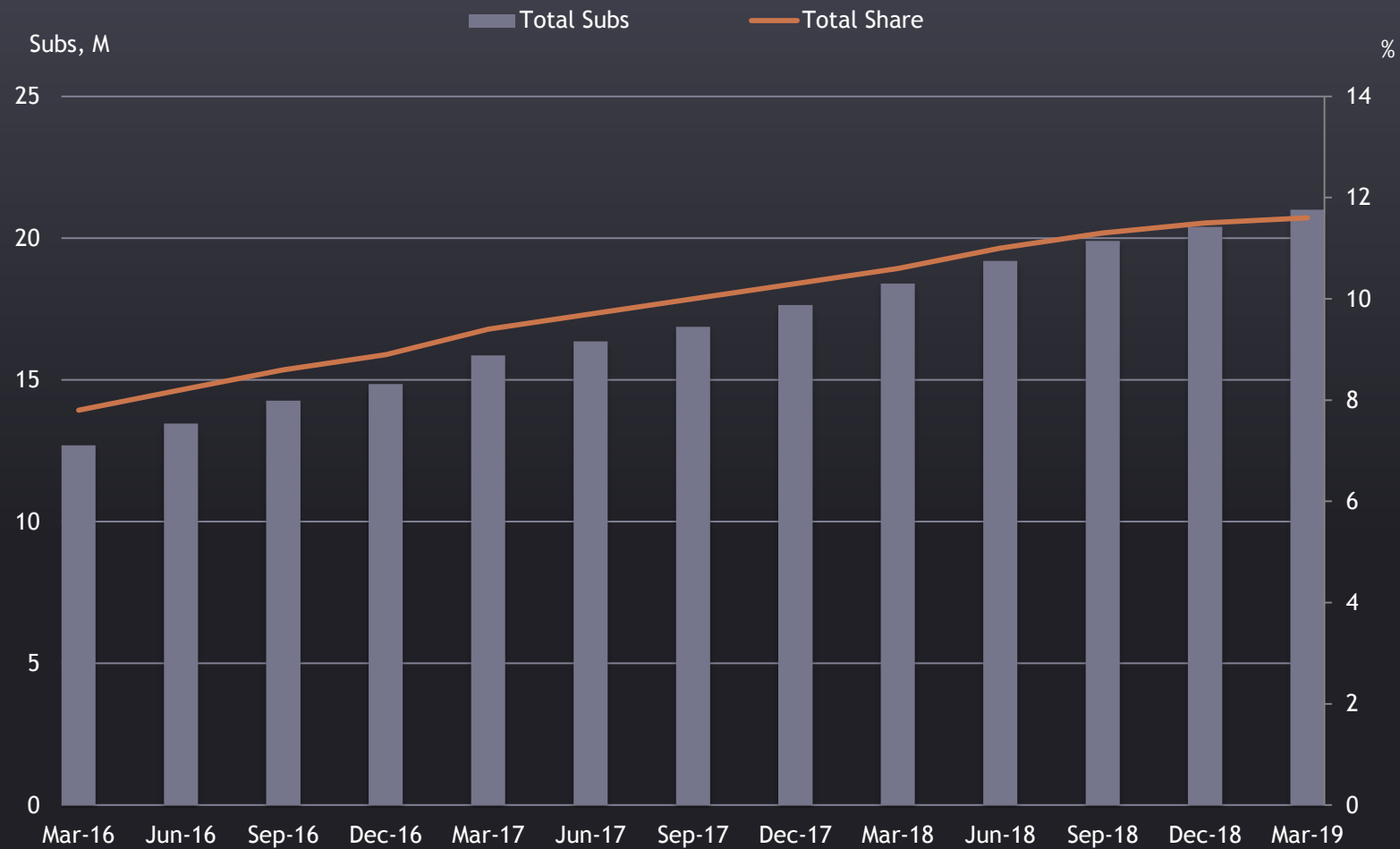
# The role of the MVNOs

Oligopolization of the telecom market is inevitable from the demand of huge investment and the nature of radio frequency (anti-fragmentation)

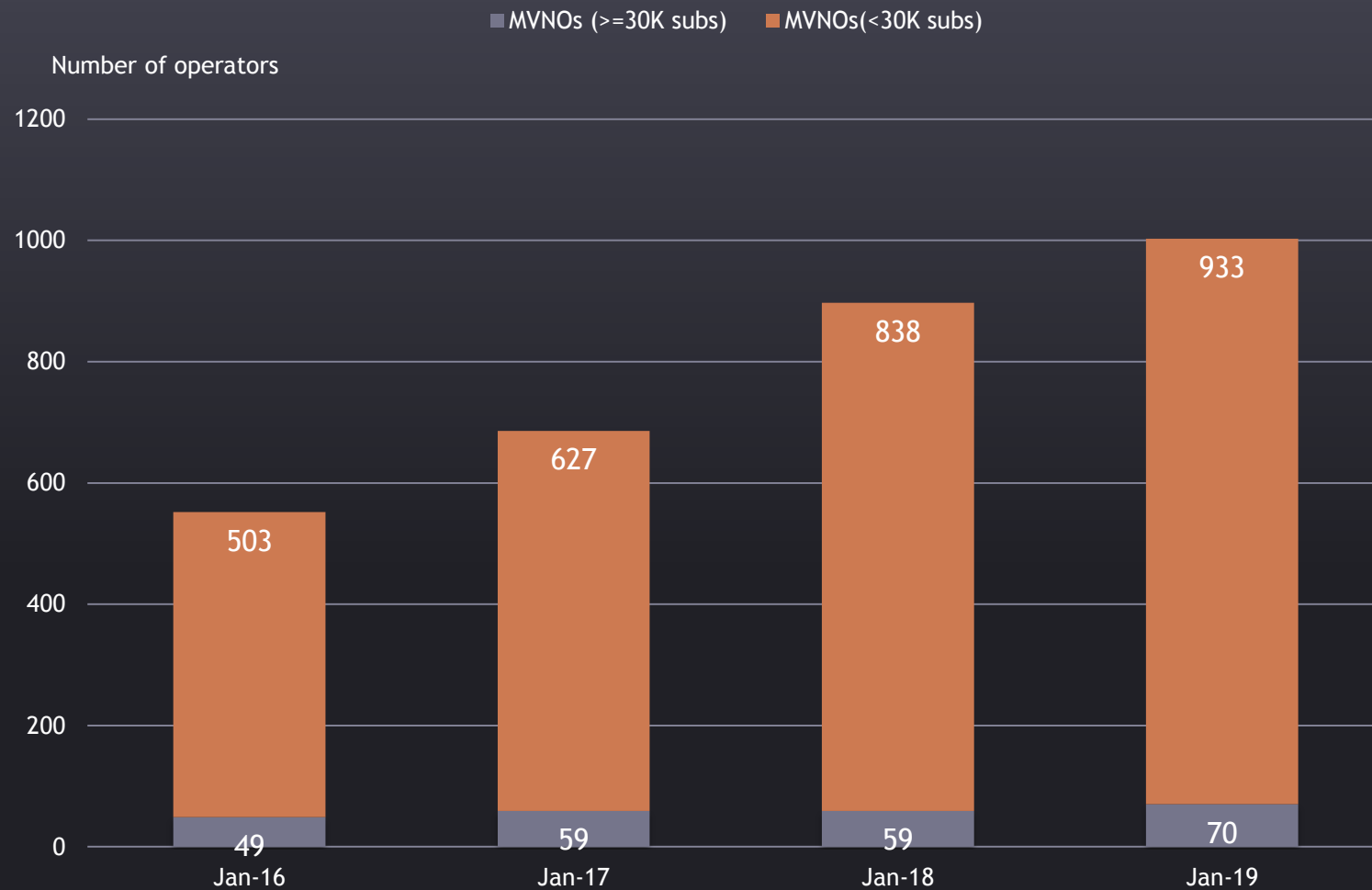
Introduction of Mobile Virtual Network Operators(MVNO) independent from radio facilities is desirable policy against less competitive market condition

Various visions and new models of business brought by various MVNOs could accelerate the innovation far beyond the reach of MNOs alone.

# Growth of Japanese MVNO market in recent years



# Growth of Japanese MVNO market in recent years



# Why is Japanese MVNO market growing so rapidly?

## Strong protective policy for MVNO

- **Non-discrimination** MVNO access
- Wholesale tariff is designated by **guideline**



## Many companies entering into MVNO market

- From existing telecom industry
- From **non-telecom** industry

Ongoing Innovation



Futoshi Sasaki

Deputy General Manager, Strategy and Business Development, MVNO  
Internet Initiative Japan Inc.

f-sasaki@iij.ad.jp

LinkedIn: <https://www.linkedin.com/in/futoshisasaki>